Forge Grants Management System

Quick Start Guide

Version 2.0 January 2025



This quick start guide is designed to get you up and running with our **Grants Management** System, Forge.

Forge replaced our previous Grant Management System, IMS, in November 2024.

Please note that what you see onscreen when using Forge may differ slightly from what is shown here.

If you have any questions about Forge, you can get in touch with the team by phoning 0800 477 8326, or emailing us at fcmoperations@callaghaninnovation.govt.nz

This document is owned by the Operations Manager, Funding and Contract Management team, at Callaghan Innovation.

Table of contents

1	Your Dashboard	3
2	<u>'My Organisation' section</u>	4
	2.1 Organisation details	4
	2.2 User management	5



Quick navigation	6
3.1 How do I create a report & claim?	6
3.2 How do I create and submit an application?	7
3.3 How do I rework, or continue working on, an application?	8
3.4 How do I submit information to satisfy a condition?	9
	Quick navigation3.1How do I create a report & claim?3.2How do I create and submit an application?3.3How do I rework, or continue working on, an application?3.4How do I submit information to satisfy a condition?



<u>Upl</u>	oading documents	.12
<u>5.1</u>	What file types can I upload?	. 12
5.2	File naming conventions and file size limits	.12





Log into Forge and you will see your Dashboard. It provides an overview of key information and actions for your organisation.

Access and notifications

Callaghan Innovation Te Pokapū Auaha	Dashboard My Organisation		Callaghan Innovation Test Organisatio ~		avigate to your organisation's information or your user ccount from this section. Notifications of important odates will also appear here.
Highlights for Callaghar 1 Application View all applications →	n Innovation Test Organisation 1 Contract View all contracts →	1 Condition View all contract conditions →	1 Report & Claim View all report & claims →	К Т уч	ey information for your organisation his section shows you the records associated with our organisation.
My pending actions (All a	associated organisations)		=	Υ Τ γα	our pending actions nis section shows tasks or records that are assigned to bu and require action.
Contract condition 0 Overdue 1 Due this mon	th O Remaining conditions				Note: If you're acting on behalf of more than one organisation, tasks and records for all of them will appear here.
∑ Report & Claim			1		
Available products to app	ly P&D Career Grant			P T to	roducts you can apply for nis section shows the products currently open apply for funding.
	The R&D Career Grant is designed to help a Masters or PhD (student) get their first job in a R&D business by contributing to the payment of the student's salary for the first six months of full time employment.				Note: Access to some of our products is restricted, so their product cards might not be visible here. To gain access, please contact your Customer Navigator or Funding Engagement Specialist. Once access is granted, the product card(s) will appear. Please note that access does not guarantee eligibility – make sure you review all product details before applying.



2.1 Organisation details

shboard My Organisation	Callaghan Innovation Test Organisatio ~
Organisation User management	
Callaghan Innovation Test Organisation	Edit
Organisation type Company	Trading name
Organisation code CINNO	ANZSIC Test
Funding Engagement Specialist	Funding & Contract Management
Website www.callaghaninnovation.govt.nz	
Addresses Physical address 69 Gracefield Road Lower Hutt 5010	O Postal address 69 Gracefield Road Lower Hutt 5010
Companies office information NZBN 9429038993824	Entity status Registered
Bank account	_
Account name Account number Email for remittance	
The second	
Financial	
Financial year end Total revenue (\$NZD excl. GST): Earnings before interest and taxation (EBT) (\$NZD excl. GST): Net profit before taxation (\$NZD excl. GST):	Exports revenue (\$NZD excl. GST): Total R&D spend (\$NZD excl. GST): (FTE): (FTE):
No items availab	Image: Second

My Organisation > Organisation

You can review and edit the information on your organisation (chosen from the drop down menu at top right) here. You can make changes to:

Here you can edit:

- your address
- bank account details
- financial information



2.2 User management

	Callaghan Innovation Test Organisatio ~
Organisation User management	
Callaghan Innovation Test	
Orgonication	
UTE Organisation	
Users that have not logged in for 12 months will be disabled in the system. Super user	

My Organisation > User management

Review and manage user access to your chosen organisation's records that are held in Forge. You have super-user status and can:

- add new users
- remove user access
- reset passwords for other users

3 Quick navigation

3.1 How do I create a report & claim?





3.2 How do I create an application?

Read more



Apply

Products you can apply for will appear as cards in the highlights section of your dashboard. You can click the 'Apply' button on the product card to create an application.

If you have any queries as you work through your application, please contact your Funding Engagement Specialist.

If you want to start an application for a grant product for which there isn't a card on your Dashboard, please talk to your Customer Navigator to discuss the grant and eligibility requirements.

Note: You don't have to complete everything in one sitting. You can save your progress and return at any time. The saved application will be available in the 'Pending Actions' section on your Dashboard.

3 Quick navigation

3.3 How do I rework, or continue working on, an application?



Expand the 'Application' section under 'My pending actions' by clicking the circular arrow button.

This will show you any applications that you have started, but not yet submitted, as well as any applications that have been returned for rework.

B Click the 'Go' button.

Α

This will take you to your application, where you can continue to work on it or rework anything you've been asked to address.

(See Section 4 for further guidance on rework.)

3 Quick navigation

3.4 How do I submit information to satisfy a condition?



Expand the 'Contract condition' section under 'My pending actions' by clicking the circular arrow button.

This will show you all the conditions awaiting action and their status.

Click the 'Go' button.

Α

В

This takes you to an area where you can upload any required documentation and add additional comments.





How do I make changes to an application (or claim) that has been returned to me for amendments?

When rework of an application or a report & claim is required you'll get a notification by email.

The email won't give details of the changes required, so you'll need to log into Forge to review and action them.

A Expand the 'Application' section under 'My pending actions' by clicking on the circular arrow button.

This will show you any applications that you have started, but not yet submitted, as well as any applications that have been returned for rework.

B Click the 'Go' button.

This will take you into the application. The sections requiring rework will have been reopened for you to edit.



nisation Callaghan Innovation Test Orga uct New to R&D Grant New to R&D Application - Custo	inisation omer Guidance	Funding amount Project start date Project end date	\$650,000.00 27/11/2024 26/11/2026	Actions •
Background and compliance	Provide further detail on v	our businesses products and servi	ces	C
Costs and Plan	As you have included ove explanation provided.	rseas external labour within your co	osting template, this question n	eeds to be updated and an
Background and compliance	D			

C Feedback from your Funding Engagement Specialist (FES).

This area displays the section(s) where amendments are required and the comments from your FES.

D Expand the sections that require rework by clicking on their circular arrow buttons.

This will expand the section, so you can make any required edits.

E Once you've made all the required edits, click the 'Submit' button.

You can also click 'Save' instead if you need to come back later to finish your edits.

Note: Make sure you've expanded all sections and completed all required edits before clicking 'Submit'.



5.1 What file types can I upload?

Extension	Description
.doc/.docx	Microsoft Word
.pdf	Portable Document File (easy to share and print)
.xls/.xlsx	Microsoft Excel
.txt	Plain text file
.jpeg/.jpg/.png	Common image file formats

5.2 File naming conventions and file size limits

- Files need to be under 20MB in size.
- Keep file names simple and descriptive.
- Don't use these characters in your file names:

hashtags **#** commas , semi colons ; colons : plus-signs + dashes or hyphens – exclamations marks ! question marks ?

6.1 Application statuses

Status	Status description	Description
In-progress	Pending items – Application	An application has been created but isn't yet complete. It's either: - newly created and not yet ready for submission, OR - has been returned for rework, with advice from your Funding Engagement Specialist as to what needs to be addressed.
Submitted	Application card (Open)	Your application has been submitted. Your Funding Engagement Specialist will assess your application against the applicable grant criteria.
Withdrawn	Application card (Closed)	An application can be withdrawn up to the point where you click the final Submit button. Your reason for withdrawing will be captured for reporting purposes. You can't edit or resubmit a withdrawn application, but you can view it.
Declined	Application card (Closed)	The application has been declined for funding. You can't edit or resubmit.
Approved	Application card (Closed)	The application has been approved and will proceed to the contracting stage. You can't make any edits once the application is approved.

6.2 Contract statuses

Status	Status description	Description
Contract setup	Contract card (Open)	Your application has been approved and the contracting process has begun. Your Operations Officer is preparing the notification of approval.
Notification for Acceptance	Pending items – Contract	The notification of approval has been sent, outlining the details of the funding. This needs to be accepted in order to proceed to the contracting stage. Requests for changes, such as amending the contract dates, can still be submitted.
Notification changes requested	Contract card (Open)	Changes have been requested following receipt of the notification of approval, e.g. asking to move the start date forward. Your Operations Officer will review the request and decide if it's acceptable.
Precontract conditions	Pending items – Contract conditions	Terms of approval have been accepted. At this point the precontract conditions need to be satisfied before a formal funding agreement can be sent.
Funding Agreement in progress	Contract card (Open)	The Funding Agreement is being drafted by your Operations Officer and going through the internal review process.
Funding Agreement to be signed	Contract card (Open)	The Funding Agreement has been sent via email (with links to Adobe e-sign) to be electronically signed.
Active	Contract card (Open)	The Funding Agreement has been signed by all parties. You now have access to the Report & Claim module.
In-Variation	Contract card (Open)	A variation has been requested and is with your Operations Officer for review.
On-Hold	Contract card (Open)	A change event has occurred and, while we work through the details with you, your contract is placed in a hibernation state. No actions can be taken.
Terminated	Contract card (Closed)	The contract has been closed prior to the end date, either as advised or as he result of a change event. No further actions can be taken, i.e. no further claims can be made.
Matured	Contract card (Closed	The contract has reached its end date. No further payments will be made and variations can't be requested. A contract will automatically mature after a set period (as stated in your funding agreement) following the contract end date.

6.3 Report & claim statuses

Status	Status description	Description
In-progress	Pending items – Report & Claim	 A report & claim has been created but isn't yet complete. It's either: newly created and not yet ready for submission, OR has been returned for rework, with advice from your Funding Engagement Specialist as to what needs to be addressed, OR you have an overdue condition and are unable to submit a claim until it has been satisfied.
Submitted	Report & Claim card (Open)	Your report & claim has been submitted and is with your Operations Officer for review.
Withdrawn	Report & Claim card (Closed)	A report & claim can be withdrawn up to the point where you click the final Submit button, e.g. if you started a progress report instead of a final report.
Declined	Report & Claim card (Closed)	Callaghan Innovation has determined that the report & claim doesn't meet its requirements and therefore can't be paid. Note that, in this situation, we will work closely with you before finalising a 'declined' status.
Approved	Report & Claim card (Open)	Your report & claim has all the necessary information and audit requirements have been met. A payment will be scheduled for the next available payment run, where applicable.